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MONTANA

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The New Wave of Immigration

A Look at New Foreign Immigration in Montana

by Tina Hash, Research and Analysis Bureau Technical Writer

Even though most new foreign immigrants continue flocking to the larger metropolitan areas of the United States, some come to the Big Sky Country to work for Montana employers.

Bob Rafferty, former bureau chief for the Montana Department of Labor and Industry's Research and Analysis Bureau, said "Montana is basically out of the migration path for new foreign immigrants," but for those who do come here, the department has a specialist who helps set wages for those seeking employment in the state.

Bob Schleicher, analyst for the Montana Department of Labor and Industry Research and Analysis Bureau and in charge of the Alien Labor Certification Program, said most new foreign immigrants in Montana are employed as maids and housekeepers, kitchen helpers, four inch hand line irrigators (on farms and ranches), computer programmers, sheepherders, university researchers, professors, software engineers, systems analysts and chefs.

Most of these immigrants work at Montana State University and the University of Montana as researchers, in Gallatin County as maids and kitchen helpers, and in southwestern Montana as four-inch hand line irrigators. On average, Schleicher sets about 200 wage rates per year for permanent and temporary nonagricultural workers. Since January of this year, he's set 106 wage rates.

Schleicher said the focus of the Alien Labor Certification Program "is to allow employers who have been unable to hire qualified American workers to bring foreign workers into the U.S. on a permanent or temporary basis." And what are some of the jobs foreign workers take in Montana? Housekeepers, sheepherders and foreign cooks, he said. Schleicher's role is to set the Alien Labor Certification Prevailing Wage Rate for all foreign workers in Montana whenever a company wants to hire a foreign worker under the H-1b, H-2b or H-2a or Permanent Visa programs.

(continued on next page)

On the Internet at:
www.ourfactsyourfuture.org



RESEARCH & ANALYSIS BUREAU
WORKFORCE SERVICES DIVISION
MONTANA DEPARTMENT OF LABOR & INDUSTRY

Foreign labor certification programs are generally designed to assure that the admission of foreign workers to work in the U.S. on a permanent or temporary basis will not adversely affect the job opportunities, wages and working conditions of American workers.

The H-1b visa is a temporary visa for professional workers to work up to two years. These can be renewed three times for a total of six years. Most of these visas are for working in computer or research fields. The H-2b visa is for temporary unskilled labor, for example, dishwashers, cooks or maids. The H-2a visa is for temporary agricultural workers.

The Permanent visa is for all workers, but either the Billings or Bozeman local Job Service Workforce Centers must conduct a market test to show there are no available, qualified American workers to do the job. Schleicher said the Permanent visa process usually takes a lot longer than the temporary visas.

The U.S. Department of Immigration and Naturalization Service has responsibility for documenting and tracking new foreign immigrants coming into the U.S.

The U.S. Department of Labor and state labor departments are involved in the process of hiring new foreign immigrants.

According to Schleicher, immigrants do not get hiring preference. "The market test has to show there are no American workers qualified or available for the position," he said.

Even though there is no such market test for the H-1b, Schleicher said there is a hiring cap in the U.S. of 195,000.

In the fall of 2003 the number returns to 65,000. There also is a cap on H-2b visas. ■

What the Census Numbers Show for Montana

The 2000 Census shows most of the foreign born arriving in Montana from 1990 to 2000 (both workers and nonworkers) are from Asia (1,456) closely followed by Europe (1,426), then Northern America, mainly Canada (1,143).

The following table below shows the top 10 counties in Montana with the largest number of foreign born, including those arriving in Montana before 1990.

Additional Census tables can be found at: <http://www.census.gov>.

If you'd like to know more about the Alien Labor Certification Program, contact Bob Schleicher, Montana Department of Labor and Industry's Research and Analysis Bureau, 406-444-2992 or toll-free at 800-541-3904. ■

Place of Birth

Top 10 Counties in Montana with Most Foreign-born Population

Geographic Area	Total population	
	Number	Percent foreign born
Montana COUNTY	902,195	1.8
Cascade County	80,357	2.4
Flathead County	74,471	2.1
Gallatin County	67,831	2.7
Lake County	26,507	1.6
Lewis and Clark County	55,716	1.6
Missoula County	95,802	2.3
Park County	15,694	2.7
Ravalli County	36,070	1.7
Silver Bow County	34,606	1.6
Yellowstone County	129,352	1.4

Source: U.S. Census Bureau, Census 2000

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Editor: Tina Hash

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840 Helena Ave.

P.O. Box 1728
Helena MT 59624

406-444-2430
TDD 406-444-0532

FAX 406-444-2638

www.ourfactsyourfuture.org

The New Wave of Immigration

A Look at New Foreign Immigration in the U.S. - continued

by Tina Hash, Research and Analysis Bureau Technical Writer

In their report "Immigrant Workers and the Great American Job Machine: The Contributions of New Foreign Immigration to National and Regional Labor Force Growth in the 1990s," the authors for the Center for Labor Market Studies at Northeastern University state the U.S. has experienced the greatest wave of new foreign immigration in its history.

According to the 2000 Census of Population, nearly 14 million net new immigrants came to the U.S. between 1990 and 2000. "New foreign immigrant" refers to any immigrant arriving in this country from 1990 on. This increase, the authors say, is greater than the influx

of new immigrants to the U.S. during each decade of the "Great Wave of Immigration," from 1890 to 1920.

The most recent Census Bureau estimate show about 32.5 million foreign-born residents in the U.S. in March 2002, two percent more than the 31.8 million in March 2001. An even greater growth rate occurred between March 2000 to March 2001.

Table 10 shows the 10 states with the highest and lowest shares of their resident labor force growth due to new foreign immigration. Montana had the lowest numbers.

The authors state in their report, "Had it not been for new immigration, the nation's labor force would

have grown by only five percent over the past decade and would have seriously constrained both job growth and economic growth."

The following are some brief findings from the report:

- New immigrant workers accounted for nearly 45 percent of the net increase in employment in the U.S. during the 1990-2000/2001 period).
- In the same timeframe among the working-age male population, new immigrant workers generated slightly under 70 percent of the employment increase.
- Immigrant women accounted for 28 percent of the growth in the nation's female employed population.
- All of the Northeast region's labor force growth can be attributed to new foreign immigration as well as 50 percent of the growth in the West; 30 percent growth in the Midwest and 72 percent in the Pacific region; less than 10 percent in several states including the Rocky Mountain region.

Between 1990 and 2000/2001, nearly one-half of the increase in the U.S. civilian labor force (employed and unemployed) was due to recently arrived immigrants.

Most of the new immigrants in the U.S. work in the private sector. The study says about three-quarters of all native born workers were employed as wage and salary workers in the private sector compared to nearly 83 percent of all foreign-born workers.

New immigrant workers are less likely to be employed by the government or self-employed, according to the study.

Table 10:

Ten States with the Highest and Lowest Shares of their Resident Labor Force Growth Due to New Foreign Immigration, 1990-2001

	(A) Number of New Immigrants In CLF (in 1000s)	(B) Percent of CLF Growth Due to New Immigrants
Top Ten States		
New York	879	--(1)
Rhode Island	24	--(1)
Connecticut	81	--(1)
Massachusetts	249	445
New Jersey	404	345
California	1,833	87
Illinois	366	85
Hawaii	46	83
Maryland	173	76
Florida	807	67
Bottom Ten States		
Mississippi	15	13.6
Louisiana	23	10.7
Alabama	27	10.4
Vermont	3	10.3
Idaho	18	9.5
Maine	4	9.0
South Dakota	4	6.7
West Virginia	4	5.8
Wyoming	18	4.5
Montana	2	3.4

Note: (1) Implies that ratio cannot be calculated since labor force growth between 1990 - 2001 was negative.

From: Center for Labor Market Studies, Northeastern University, Boston, MA "Immigrant Workers and the Great American Job Machine..."

CLF=Civilian Labor Force

(continued on next page)

In addition, according to recent estimates by the U.S. Census Bureau, authors of this report and the Urban Institute, there could have been as many as nine million undocumented immigrants in the U.S. in 2000 of which many were working age.

The authors mention that at no time in the last 90 years has the U.S. been so dependent on immigrant labor to meet its need for workers in the labor force, and continuing to absorb them in the

workforce will require help from various state and local resources to assist in improving their English-speaking skills and provide education and training.

The report was prepared by: Andrew Sum, Necta Fogg and Paul Harrington with Ishwar Khatiwada, Mykhaylo Trub'skyy and Sheila Palma.

The entire report can be found on the Internet at Northeastern's website at: www.nupr.neu.edu/. ■

Table 15 shows changes in the civilian labor force by age groups.

Table 15:
Changes in the Civilian Labor Force of the U.S. by Age Group,
1990 to 2000/2001
Numbers in 1000s

	1990	2000-2001	Absolute Change	Recent Immigrants	Immigrants Share of Growth
Total	125,847	141,649	15,792	7,469	47.3%
Age					
16-24	22,493	22,780	287	1,678	584.7%
25-34	35,938	31,405	-4,533	2,873	All
35-44	32,149	37,735	5,586	1,771	31.7%
45-54	20,249	30,994	10,745	797	7.4%
55-64	11,578	14,361	2,783	292	10.5%
65 or more	3,449	4,374	925	56	6.1%

From: Center for Labor Market Studies, Northeastern University, Boston, MA
"Immigrant Workers and the Great American Job Machine..."

Table 17 shows the distribution of all employed persons in the U.S.

Table 17:
Percentage Distribution of All Employed Persons
by Class of Worker, U.S., 2000-2001

Class of Worker	All	Native Born	All Immigrants	Recently Arrived Immigrants	Earlier Arrival Immigrants
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Private wage & salary workers	75.9%	74.8%	82.9%	89.4%	78.6%
Government	13.8%	14.7%	7.7%	5.0%	9.5%
Self employed	10.2%	10.3%	9.2%	5.5%	11.7%
Without pay	0.1%	0.1%	0.1%	0.1%	0.1%

From: Center for Labor Market Studies, Northeastern University, Boston, MA
"Immigrant Workers and the Great American Job Machine..."

Who's Taking Care of Aging Montanans

by Kitty Cutting, Research and Analysis Bureau Research Specialist

Baby Boomers taking care of aging parents look to health care practitioners/technicians and health care support occupations to make sure their parents receive the best care.

The Health Care Support Occupations include the following occupations: Home Health Aides; Nursing Aides, Orderlies and Attendants; Psychiatric Aides; Occupational Therapist Assistants; Occupational Therapist Aides, Physical Therapist Assistants; Physical Therapist Aides; Massage Therapists; Medical Assistants; Medical Equipment Preparers; Medical Transcriptionists; and Pharmacy Aides.

The following are five Health Care Support Occupations for Montana workers with job descriptions, wages (assuming full-time work and based on the Montana Informational Wage Rates by Occupation for 2001), current jobs existing and projected job openings (based on the Montana Job Projections, 2000-2010), and training needs for these occupations.

1.) **Home Health Aides**-Provide routine, personal health care, such as bathing, dressing or grooming to elderly, convalescent or disabled persons in the home of patients or in a residential care facility. *Illustrative Example: Home Attendant*

Hourly Wage (Middle Range)

\$7.21 - \$9.06

Average Annual Wage \$17,310

Training Needed

Short-term on-the-job training

Jobs Existing in Year 2000 2,663

Jobs Projected for Year 2010 3,570

2.) **Nursing Aides, Orderlies and Attendants**-Provide basic patient care under direction of nursing staff. Perform duties, such as feed, bathe, dress, groom or move patients or change linens. Exclude "Home Health Aides" and "Psychiatric Aides." *Illustrative Examples: Certified Nursing Assistant, Hospital Aide, Infirmary Attendant*

Hourly Wage (Middle Range)

\$7.23 - \$9.09

Average Annual Wage \$17,050

Training Needed

Short-term on-the-job training

Jobs Existing in Year 2000 5,040

Jobs Projected for Year 2010 6,155

(continued on page 8)

Job Projections for Yellowstone County, Montana Industries, 2000-2010

by Phil Brooks, Chief Economist, Research and Analysis Bureau,
Workforce Services Division, Montana Department of Labor and Industry

Although the future is never certain, it is useful to look ahead and try to determine what generally may happen in terms of the number of jobs supported within Yellowstone County's economic sectors. Previously, statewide projections also were completed for the 2000 to 2010 time period.

Most job growth involves wage and salary (payroll) jobs; consequently, wage and salary jobs will be emphasized in this narrative. Because of the inherent uncertainty in predicting the future, all of the projections presented here should be interpreted as only a general approximation of the true future level of jobs overall or for a given industry.

About 1,900 Additional Jobs a Year Projected Through 2010

Roughly 19,000 net additional jobs (difference between jobs created and jobs destroyed) are projected for Yellowstone County between 2000 and 2010—16,000 of which are estimated to be wage and salary jobs and 3,000 of which are projected to be self-employment jobs. This translates to about 1,900 net jobs per year consisting of both wage and salary jobs (2.2 percent per year) and self-employment jobs (1.8 percent per year).

The comparable growth rates statewide are 1.7 percent and 1.4 percent, respectively. One would expect Montana's largest urban area to grow faster than statewide partly because of the historical movement of people from rural to urban areas, and lower growth rates in most Montana rural counties.

Most Job Growth in Service-Producing Sectors

As is true statewide, the vast majority of payroll jobs growth (about 14,000 net payroll jobs) is projected to be in the services-producing segment of Yellowstone county's economy, which contains industries that do not produce a physical product.

The largest service industry growth (2,700 jobs) is forecast for business services. Within this sector, most of the growth is in the personnel supply (employee leasing), security, call centers and computer services segments. A relatively large increase (2,000 jobs) is also forecast for health services, the largest service sector. Most of this growth is expected to be in the hospital and offices of health professionals segments.

Eating and drinking places are projected to add about 1,100 payroll jobs over the period 2000 to 2010. Other projected large increases are in social services at roughly 900 jobs (non-medical residential care, child day care, counseling, etc.); amusement and recreational services (about 800); wholesale trade involving durable goods (600); wholesale nondurable goods (600); and motor vehicle dealers, gasoline service stations, and parts stores (600). These service industries represent a mixture of low- and high-paying jobs.

Job Growth in Goods-Producing Sectors Much Smaller

Overall job growth forecast for the goods-producing segment of the Yellowstone County (Billings area) economy through 2010 is much, much more modest than for service-type sectors.

Wage and salary jobs are projected to continue to decline in production agriculture. Forecasted job growth for mining is small (two per year), all in oil and gas extraction, which dominates the county's small mining sector. Construction payroll jobs are forecast to increase (130 per year), particularly for special trade construction contractors, e.g., plumbing, electrical, and and roofing contractors. Very modest growth is forecast for Yellowstone County manufacturing, somewhat similar to the Montana and U.S. manufacturing sectors. *Please refer to the following tables on pages 9 and 10 for projections for broadly defined industries*

as well as for about 100 specific economic sectors. Information on an additional 50 Yellowstone County sectors is available on request.

Services Jobs

Narrowly defined, services (referenced as other private services in table 10) is a major part of the broader service-producing segment of the Yellowstone County, Montana and U.S. economies.

Services is projected to increase by about 8,300 net wage and salary jobs in Yellowstone county between 2000 and 2010. This increase accounts for more than half the additional payroll jobs for this time period. (Information in the table on page 10 details the variety of consumer, producer and professional services included in this category.)

Within the narrowly defined services category and as mentioned above, business services is projected to increase by roughly 2,700 wage and salary jobs between 2000 and 2010 (annual growth rate of 4.5 percent). Major components of this sector include temporary help agencies that supply workers to various industries, and computer services. Growth in this industry is part of a national trend. Computer services and security, telephone call centers and other miscellaneous business services are forecast to be the components with the highest growth rates, with the personnel supply subsector forecast to have the largest employment increase at about 1,300 jobs. Average annual wages in 2002 ranged from about \$32,800 for computer services payroll jobs to roughly \$10,900 for building maintenance, reflecting in part differences in skill levels.

Overall, Yellowstone County 2002 wages in business services averaged \$19,100, well below average for the county (\$28,500) and Montana (\$26,000).

(continued on next page)

Also mentioned above, the largest service sector, **health services**, is expected to increase by roughly 2,000 payroll jobs, or an annual growth rate of 2.6 percent, higher than the industry's statewide rate of growth because medical services are becoming more concentrated in the state's urban areas. This trend is expected to continue. Most of the job growth is forecast for the hospital, and health practitioners' office segments of health services. Yellowstone County health services payroll jobs paid an average of \$41,900 in 2002, well above the county and statewide averages. Within health services, annual pay ranged from \$15,200 for home health care services to about \$92,700 on average for a medical doctor's office. As usual, differences in required skills account for much of this disparity.

Pieces of the low-paying recreation, travel and tourism industry are located within the narrowly defined services category—namely hotels and other lodging places, and amusement and recreational services. This latter subsector is projected to increase by approximately 800 payroll jobs between 2000 and 2010. Average county 2002 wages for recreational services were about \$12,400. Hotels and other lodging places is projected to increase by about 400 payroll jobs, with 2002 average annual wages being \$500 higher than those within recreation services.

Social services is projected to increase by about 900 payroll jobs over the period, or an average of roughly 90 jobs per year. Social services include nonmedical individual and family social services, nonmedical residential care, child day care services, along with job training and vocational rehabilitation services. About 50 of the 90 forecasted job openings will be in the residential care portion of social services. This is partly the result of the national trend toward shifting counseling and residential treatment programs away from situations where medical doctors are involved, along with the general aging of the population. Wages for 2002 in this sector averaged about \$17,400.

The narrowly defined services category also includes the **engineering and management services** sector, which is projected to increase by roughly 500 payroll jobs 2000 to 2010. The sector is the second highest paying segment of narrowly defined services. Legal services paid the highest, with \$47,400 average pay for Yellowstone County in 2002. Engineering and management services paid \$44,500 on average.

Retail Trade Jobs

Retail trade (a portion of the service-producing sector) is projected to add a total of about 2,900 payroll jobs to Yellowstone county's economy between 2000 and 2010, accounting for roughly 20 percent of total additional county payroll jobs. Retail trade generally is a low-paying segment of the Yellowstone County, Montana, and national economies.

About two-fifths of the retail payroll job increase—approximately 110 jobs per year—is projected to be in eating and drinking places (fast-food outlets, restaurants and bars). Average year 2002 wages in this sector were low at \$11,200. Even if one added in tip income, annual wages still would be low.

The **motor vehicle dealers, parts and service stations** retail trade sector is projected to increase by roughly 60 wage and salary jobs yearly, with average wages of \$29,800. Most of the employment in this sector is not in gasoline service stations, leading to higher than average wages. A major portion of the low wage gasoline service stations and eating/drinking places industries serves out-of-state tourists and business travelers.

Wage and salary jobs in **general merchandise stores**, both discount and nondiscount, are projected to increase by about 40 per year over the 2000 to 2010 time period. Year 2002 annual wages were \$18,300.

Miscellaneous retail stores (e.g., sporting goods, used merchandise, drugstores and gift shops) serves both Montana residents and travelers to the state. The projected 2000 to 2010 payroll job increase for this retail sector is about 260 jobs or an

average of 26 per year. Average 2002 wages for other retail trade were \$18,100. The home furnishings stores sector also is forecast for average yearly increases in jobs of about 26. 2002 wages averaged \$21,600.

Retail building materials stores are forecast to add 170 payroll jobs over the period, largely as the result of projected building construction activity. 2002 average annual wages were \$24,000. This is a higher-wage component of retail trade. The other two components of retail trade—**retail food stores and clothing stores**—are projected to have virtually no job increases. In recent years, food store employment has been negatively impacted by industry consolidation and by general merchandise stores like Wal-Mart adding grocery departments. Employment in grocery departments of these stores is not separately reported.

Construction Jobs

Nearly all the growth in goods-producing industries is projected to be in the construction sector, which is forecast to grow by about 1,300 jobs between 2000 and 2010 (130 per year on average). Within construction, the growth area is in building construction, both **general building contractors** and **special trade contractors** (e.g., plumbing, heating and electrical), with the latter having the stronger growth. Heavy construction is projected to increase by roughly 250 jobs over the 2000 to 2010 time period.

Construction is a higher annual wage sector, with 2002 average Yellowstone County construction wages of \$34,600. Heavy construction is the highest annual wage component, \$42,200 for 2002. General building contractors and special trade contractors are at roughly the same level, with 2002 annual wages of \$30,700 and \$31,600, respectively.

Wholesale Trade Jobs

Wholesale trade, which primarily provides services to businesses, is projected to increase by about 1,200 payroll jobs between 2000 and 2010. Because Billings is a wholesale trade center, this sector is relatively more important to Yellowstone County as compared with the state statewide. Its share of county payroll jobs is about twice its share statewide (9 percent vs. 4.5 percent). Year 2002 average annual wages were about \$35,300, making wholesale trade one of the higher-paying components of the Yellowstone County economy.

Transportation, Communications and Utilities Jobs

Transportation, communications and utilities services together are projected to increase by about 700 payroll jobs or roughly 70 per year on average. The railroad and small pipeline sectors are both projected to have employment declines, which is also true statewide and nationally. Jobs in the electric, gas and sanitary services sector are projected to be essentially flat. Some of the projected decline in railroad transportation and pipeline jobs is due to restructuring and substituting capital equipment for labor. 2002 annual wages were about \$56,000 for electric services, gas and sanitary services; and \$72,000 for the small pipelines sector—all high-paying segments of the Yellowstone County and Montana economies. The railroad sector is high paying both statewide and in Yellowstone County, but 2002 annual wage data are not available. Local transportation and other transport services (arrangement of transportation services) are lower-paying segments with 2002 annual wages at about \$19,100 and \$24,700, respectively.

The rest of this portion of the Montana economy is projected to have increased employment, led by the motor freight transportation, air transportation and communications sectors with projected increases of 250, 200, and 180 wage and salary jobs respectively over the 2000 to 2010 period. Average pay in 2002

for these sectors was \$29,500, \$30,200 and \$35,900 respectively. Much more modest job increases are projected for local transportation (includes school bus contractors), and other transport services (air, ranging transportation, etc.).

Finance, Insurance and Real Estate Jobs

The high-paying (\$38,400) finance, insurance and real estate services industry is forecast to grow by about 700 payroll jobs. Finance is projected to grow by approximately 400 jobs, mostly in the banking segment of the industry. Finance also includes securities brokers and services, the highest-paying segment of the Yellowstone County economy, paying about \$76,000 on average per job in 2002. Average pay for banking and other depository institutions was more modest at \$34,900. Given the decline in payroll real estate jobs in the late 1990s, the real estate sector is forecast to increase only very modestly. This is a lower-paying segment at \$21,300 for 2002 payroll jobs. The insurance agents and services sector is projected to increase about 170 jobs over 10 years. No increase is projected for the small, relatively high-paying segment, insurance carriers (\$46,300).

Government Jobs

Between 2000 and the year 2010, government employment is projected to grow at less than one third the annual rate for the Yellowstone County economy as a whole (0.6 percent vs. 2.1 percent) for a total of about 530 jobs. The annual growth rate for the Yellowstone County government sector is similar to the Montana statewide government growth rate of 0.5 percent. Nearly all the increase is forecast for noneducation local government and state education, which in turn are generally related to Yellowstone County population growth. The only other segment of government projected to increase is local public education (K-12), with a very modest increase of 10 per year. Other government sectors are forecast to decline over the 2000 to

2010 period. These are: federal government and other state government (noneducation agencies). The federal job decline is part of a national trend. 2002 average wages per federal job was high at \$50,500.

All of the state government sector job growth will be in the state education component of public education (MSU+Billings). Yellowstone County is following the statewide trend for this segment of the economy. Adult population growth and research contracts are driving statewide employment increases. Year 2002 Yellowstone County state higher education wages averaged about \$30,700.

Noneducation local government is projected to increase by roughly 300 jobs over the period 2000 to 2010, an annual growth rate of 1.6 percent, below the overall county growth rate of just over 2 percent. Additional slow growth is projected for local public education (0.3 percent or 10 jobs per year). These jobs averaged \$26,200 for 2002, below the county average.

Manufacturing Jobs

Manufacturing is projected to grow slowly, 2000 to 2010, at about 0.7 percent per year or 25 jobs annually. The largest Yellowstone County manufacturing sector is petroleum refining (products). Yellowstone County has the vast majority of statewide employment for this sector. It is projected to increase in employment (9 jobs per year). The statewide industry is forecast to increase also. Yellowstone County average annual wages for this sector were very high, about \$70,000 in 2002. The apparel fabrication subsector is forecast to increase by roughly 9 jobs per year also. Average wages were \$21,400 in 2002.

The next largest manufacturing industry is food processing, which is projected to decrease in keeping with its statewide counterpart. Annual 2002 wages were above average at approximately \$34,000.

The next largest industry, printing

(continued on next page)

and publishing, also is expected to decline in employment. Statewide this industry is projected to increase. The Yellowstone County projection differs from the statewide forecast because of the difference in the newspaper publishing subsector in Yellowstone County as compared statewide. 2002 average wages were about \$32,400.

The other smaller Yellowstone County manufacturing sectors were forecast to increase in employment by very small amounts. Overall, year 2002 manufacturing wages for Yellowstone County were approximately \$41,600.

Agriculture and Forestry Jobs

The Yellowstone County agriculture and forestry segment of the goods-producing portion of its economy is largely agricultural services including lawn, landscaping and veterinary services rather than production agriculture, the raising of crops and livestock. Incidentally, even though agricultural services is a service-type industry, it has historically been included with goods-producing industries because of its traditional tie to production agriculture. The smaller relative importance of production agriculture for Yellowstone County is because Yellowstone is an urban rather than a rural county. In addition, a large part of Yellowstone County veterinary services consists of the provision of pet services to private households, rather than the more historical services for production agriculture. Forestry is a tiny part of the Billings area economy.

Production agriculture has experienced employment declines in payroll jobs for many decades in both Yellowstone County and statewide. Projected to continue, this decline is caused partly by the substitution of machinery and equipment (tractors, etc.) for labor. A decrease of 80 production agricultural wage and salary jobs is projected for Yellowstone County for the 2000-2010 period. Year 2002 annual wages are not available; 2001 wages for the sector were around \$25,000, below average. On the other hand, agri-

cultural services, is projected to increase in keeping with projected population increases. Average annual wages in this sector for 2002 were about \$18,000, well below average.

Mining Jobs

The small Yellowstone County mining sector, which is almost entirely related to oil and gas extraction, is projected to increase slightly by about 20 jobs between 2000 and 2010. This increase in oil and gas jobs is in keeping with statewide and national projections. Mining jobs in Yellowstone County for 2002 were well paid at about \$48,000, on average.

Conclusions

Because the Yellowstone County economy is part of the Montana economy, projected county employment bears some similarity with Montana job projections. Over the period, 2000-2010, Yellowstone County employment is forecast to increase about 2.1 percent per year (includes self-employed). This is similar to the statewide projected increase of 1.6 percent. Yellowstone County's projected growth rate is higher than the statewide increase partly because of the continued shift of population and employment from rural to urban areas. Most of the employment increases are in the service-producing segments of both economies. Within the service-producing segment, the largest absolute job gains are for business and health services for both areas. Slow growth is forecast overall for the goods-producing segments of the Yellowstone and Montana economies, with production agriculture payroll jobs projected to decline.

The combined agriculture and forestry portion of the Yellowstone County economy is forecast to increase modestly, only because of the anomaly of including agricultural services as part of this category. This agriculture and forestry segment statewide is projected to decline in employment, since production agriculture is more important statewide. (See tables on pages 9 and 10.) ■

(continued from page 4)

3.) Medical Assistants-Perform administrative and certain clinical duties under the direction of physician. Administrative duties may include scheduling appointments, maintaining medical records, billing, and coding for insurance purposes. Clinical duties may include taking and recording vital signs and medical histories, preparing patients for examination, drawing blood and administering medications as directed by physician. Exclude "Physician Assistants." *Illustrative Examples: Morgue Attendant, Ophthalmic Aide, Physicians Aide*

Hourly Wage (Middle Range)

\$9.01 - \$11.51

Average Annual Wage \$21,910

Training Needed

Moderate-term on-the-job training

Jobs Existing in Year 2000 797

Jobs Projected for Year 2010 1,212

4.) Medical Equipment Preparers-Prepare, sterilize, install or clean laboratory or healthcare equipment. May perform routine laboratory tasks and operate or inspect equipment.

Illustrative Examples: Bandage Maker, Hot Packer, Sterilizer

Hourly Wage (Middle Range)

\$8.72 - \$11.54

Average Annual Wage \$20,920

Training Needed

Short-term on-the-job training

Jobs Existing in Year 2000 102

Jobs Projected for Year 2010 118

5.) Medical Transcriptionists-Use transcribing machines with headset and foot pedal to listen to recordings by physicians and other healthcare professionals dictating a variety of medical reports, such as emergency room visits, diagnostic imaging studies, operations, chart reviews, and final summaries. Transcribe dictated reports and translate medical jargon and abbreviations into their expanded forms. Edit as necessary and return reports in either printed or electronic form to the dictator for review and signature, or correction.

Illustrative Example: Medical Stenographer

Hourly Wage (Middle Range)

\$9.84 - \$13.23

Average Annual Wage \$23,940

Training Needed

Postsecondary Vocational training

Jobs Existing in Year 2000 482

Jobs Projected for Year 2010 610

For more information on Montana wage rates and job projections to 2010, visit our website at www.ourfactsfuture.org. ■

YELLOWSTONE COUNTY JOBS BY INDUSTRY

1989, 2000, 2001, 2002 and Projected 2010

800 CODE*	INDUSTRY	1989 Annual Average Jobs	2000 Annual Average Jobs	2001 Annual Average Jobs	2002 Annual Average Jobs	Projected 2010 Jobs	Projected Job Change 2000 to 2010	Annual Growth Rate 2000 to 2010	Montana Annual Growth Rate 2000 to 2010
	PAYROLL JOBS								
	AGRICULTURE AND FORESTRY	424	590	642	695	702	11	1.8%	-1.9%
01 & 02	PRODUCTION AGRICULTURE, CROPS & LIVESTOCK	260	246	228	236	170	-8	-3.6%	-3.8%
07	VETERINARY & OTHER AGRICULTURAL SERVICES	D	D	D	D	516	D	D	2.7%
08	FORESTRY	D	D	D	D	16	D	D	0.4%
	MINING	381	235	205	195	257	2	0.9%	0.6%
10	METAL MINING	0	D	D	D	1	D	D	1.1%
12	COAL MINING	D	D	D	D	1	D	D	-1.0%
13	OIL & GAS EXTRACTION	360	221	201	193	255	3	1.4%	0.5%
14	NONENERGY NONMETAL MINING	D	D	D	D	0	D	D	1.1%
	CONSTRUCTION	1,645	3,346	3,559	3,968	4,623	128	3.3%	2.7%
15	GENERAL BUILDING CONTRACTORS	289	616	761	799	929	31	4.2%	3.0%
16	HEAVY CONSTRUCTION	347	912	934	1,187	1,153	24	2.4%	1.0%
17	SPECIAL TRADE CONTRACTORS	1,009	1,818	1,864	1,982	2,541	72	3.4%	3.1%
	MANUFACTURING	3,391	3,447	3,509	3,319	3,693	25	0.7%	0.4%
20	FOOD PROCESSING	901	600	622	573	503	-10	-1.7%	-0.6%
22	TEXTILE MILL PRODUCTS	D	D	D	D	2	D	D	D
23	APPAREL	D	170	169	179	263	9	4.5%	-0.4%
24	WOOD PRODUCTS	62	97	107	116	132	4	3.1%	1.2%
25	FURNITURE MANUFACTURING	44	33	31	25	39	1	1.8%	1.9%
26	PAPER PRODUCTS	D	D	D	D	2	D	D	D
27	NEWSPAPERS & OTHER PRINTING & PUBLISHING	681	521	512	486	448	-7	-1.5%	1.2%
28	CHEMICALS MANUFACTURING	108	113	109	105	140	3	2.2%	2.0%
29	PETROLEUM PRODUCTS	907	881	879	851	970	9	1.0%	1.5%
30	RUBBER PRODUCTS	0	115	129	123	168	5	3.9%	3.1%
31	LEATHER PRODUCTS	0	D	D	D	1	D	D	-3.1%
32	STONE, CLAY & GLASS PRODUCTS	152	126	120	96	179	5	3.6%	0.9%
33	PRIMARY METALS	D	D	D	D	16	D	D	-4.9%
34	FABRICATED METALS	187	263	270	248	292	3	1.1%	2.5%
35	INDUSTRIAL MACHINERY	98	190	196	179	204	1	0.7%	-5.7%
36	ELECTRONIC EQUIPMENT	D	7	D	D	7	0	0.0%	1.1%
37	TRANSPORTATION EQUIPMENT	114	D	D	D	116	D	D	0.5%
38	INSTRUMENTS	21	D	D	D	37	D	D	1.9%
39	SIGNS, JEWELRY & OTHER MISC. MANUFACTURING	90	134	178	174	174	4	2.6%	2.9%
	TRANSPORTATION AND UTILITIES	3,961	4,400	4,392	4,426	5,137	74	1.5%	1.3%
40	RAILROADS	D	D	D	D	423	D	D	-1.8%
41	LOCAL & INTERURBAN PASSENGER TRANSPORTATION	209	410	406	363	483	7	1.7%	1.2%
42	MOTOR FREIGHT TRANSPORTATION	1,445	1,451	1,394	1,396	1,700	25	1.6%	2.4%
45	AIR TRANSPORTATION	461	848	876	869	1,046	20	2.1%	1.9%
46	PIPELINES, EXCEPT NATURAL GAS	D	D	D	D	27	D	D	-13.2%
47	OTHER TRANSPORTATION SERVICES	98	223	242	277	289	7	2.6%	1.4%
48	TELEPHONE & OTHER COMMUNICATION SERVICES	892	640	605	670	815	18	2.4%	2.7%
49	ELECTRIC, GAS & SANITARY SERVICES	355	350	364	361	354	0	0.1%	-0.4%
	WHOLESALE TRADE	5,197	6,316	6,332	6,230	7,546	123	1.8%	1.7%
50	WHOLESALE TRADE (DURABLE GOODS)	2,890	3,767	3,776	3,690	4,385	62	1.5%	1.7%
51	WHOLESALE TRADE (NONDURABLE GOODS)	2,307	2,549	2,556	2,540	3,161	61	2.2%	1.7%
	RETAIL TRADE	12,112	14,745	15,210	15,393	17,602	286	1.8%	1.6%
52	BUILDING MATERIALS	469	802	826	819	976	17	2.0%	2.3%
53	GENERAL MERCHANDISE STORES	1,653	1,855	2,272	2,135	2,284	43	2.1%	1.8%
54	FOOD STORES	1,494	1,400	1,254	1,189	1,439	4	0.3%	0.5%
55	MOTOR VEHICLE DEALERS, GAS STATIONS, STORES	1,617	1,875	1,903	1,916	2,476	60	2.8%	2.5%
56	CLOTHING STORES	523	630	598	651	648	2	0.3%	-1.7%
57	FURNITURE STORES	546	795	821	912	1,058	26	2.9%	2.2%
58	EATING & DRINKING PLACES	4,549	5,713	5,790	6,093	6,788	108	1.7%	1.6%
59	MISCELLANEOUS RETAIL	1,261	1,675	1,746	1,678	1,933	26	1.4%	1.5%
	FINANCE, INSURANCE AND REAL ESTATE	2,549	3,285	3,382	3,472	3,950	67	1.9%	1.2%
60	BANKS & OTHER DEPOSITORY INSTITUTIONS	1,079	1,172	1,241	1,305	1,494	32	2.5%	0.9%
61	NONDEPOSITORY INSTITUTIONS	117	153	169	201	213	6	3.4%	0.1%
62	SECURITY BROKERS	160	347	366	343	391	4	1.2%	1.9%
63	INSURANCE CARRIERS	191	281	269	263	261	-2	-0.7%	-1.1%
64	INSURANCE AGENTS	365	508	586	597	675	17	2.9%	1.3%
65	REAL ESTATE	508	653	593	603	707	5	0.8%	3.0%
67	HOLDING COMPANIES	129	171	158	160	209	4	2.0%	1.6%

*Standard Industrial Classification Code

†Do Not Discloseable: fewer than three business establishments, or one establishment with 80 percent or more of an industry's employment; suppressed: industry's jobs included in totals

Sources: Research & Analysis Bureau, Montana Department of Labor & Industry; Bureau of Economic Analysis, U.S. Department of Commerce for historical self-employment

jobs, and historical payroll jobs for production agriculture and railroads; County Business Patterns published by the U.S. Bureau of the Census for jobs not covered by

unemployment insurance (work-study jobs, clergy, etc.) private colleges, religious organizations and life insurance carriers

YELLOWSTONE COUNTY JOBS BY INDUSTRY

1989, 2000, 2001, 2002 and Projected 2010

SIC CODE*	INDUSTRY	1989 Annual Average Jobs	2000 Annual Average Jobs	2001 Annual Average Jobs	2002 Annual Average Jobs	Pro- jected 2010 Jobs	Pro- jected Job Change 2000 to 2010	Annual Growth Rate 2000 to 2010	Montana Annual Growth Rate 2000 to 2010
	OTHER PRIVATE SERVICES	13,652	21,733	22,990	23,714	30,056	832	3.3%	2.9%
70	HOTELS & OTHER LODGING PLACES	873	941	1,118	1,141	1,372	43	3.8%	2.3%
72	BEAUTY SHOPS & OTHER PERSONAL SERVICES	571	667	671	699	797	13	1.8%	0.6%
73	BUSINESS SERVICES	1,691	4,962	5,358	5,313	7,679	272	4.5%	4.3%
731	Advertising	56	87	87	88	125	4	3.7%	3.6%
732	Credit Reporting, Adjustment & Collection Services	57	48	55	37	51	0	0.6%	0.6%
733	Photocopying, Secretarial & Commercial Art Services	22	72	78	74	87	2	1.9%	1.4%
734	Building Maintenance Services	374	541	494	473	528	-1	-0.2%	0.4%
735	Equipment Rental Services	88	91	131	131	147	6	4.9%	4.3%
736	Personnel Supply Services	424	2,421	2,745	2,569	3,744	132	4.5%	4.1%
737	Computer Services	153	809	879	1,011	1,431	62	5.9%	6.0%
738	Security, Telephone Call Centers, Other Business Services	517	893	889	930	1,566	67	5.8%	5.6%
75	MOTOR VEHICLE REPAIR	569	913	927	946	1,208	30	2.8%	2.4%
76	OTHER REPAIR SERVICES	361	280	260	236	316	4	1.2%	2.5%
78	MOTION PICTURES	177	208	247	239	308	10	4.0%	1.9%
79	AMUSEMENT & RECREATIONAL SERVICES	626	1,122	1,175	1,291	1,910	79	5.5%	4.9%
80	HEALTH SERVICES	5,083	6,676	6,950	7,308	8,626	195	2.6%	2.4%
801	Offices of Medical Doctors	861	584	603	616	984	40	5.4%	3.3%
802	Offices of Dentists	298	391	417	430	495	10	2.4%	1.9%
803	Offices of Osteopathic Physicians	D	0	0	0	0	0	0.0%	5.3%
804	Offices of Other Health Practitioners	200	345	364	372	438	9	2.4%	2.5%
805	Nursing Care Facilities	782	956	985	1,020	1,206	25	2.4%	2.5%
806	Hospitals	2,655	3,980	4,189	4,444	4,760	78	1.8%	1.2%
807	Medical & Dental Laboratories	67	89	90	91	105	2	1.7%	1.9%
808	Home Health Care Services	D	125	90	119	298	17	9.1%	6.5%
809	Other Health Services	135	206	212	216	340	13	5.1%	5.5%
81	LEGAL SERVICES	482	505	521	535	706	20	3.4%	2.9%
82	PRIVATE EDUCATIONAL SERVICES	300	604	594	606	682	8	1.2%	1.5%
83	PRIVATE SOCIAL SERVICES	1,082	2,068	2,290	2,415	2,952	88	3.6%	3.3%
832	Individual & Family Counseling & Other Services	178	525	487	510	632	11	1.9%	2.4%
833	Job Training & Vocational Rehabilitation	214	226	232	234	266	4	1.6%	2.7%
835	Child Day Care Services	185	387	426	447	607	22	4.6%	5.2%
836	Homes for the Aged, Children & Other Residential Care	374	758	938	1,017	1,225	47	4.9%	4.0%
839	Human Resource Councils & Other Social Services	131	172	207	207	222	5	2.6%	1.7%
84	MUSEUMS & ZOOS	23	54	53	59	71	2	2.8%	3.3%
86	MEMBERSHIP ORGANIZATIONS	804	1,054	1,133	1,159	1,211	16	1.4%	1.0%
87	ENGINEERING, ACCOUNTING & MANAGEMENT SERVICES	931	1,597	1,690	1,664	2,084	49	2.7%	3.8%
871	Engineering & Architectural Services	434	769	778	805	895	13	1.5%	2.5%
872	Accounting Services	226	351	353	346	441	9	2.3%	2.4%
873	Research & Testing Services	89	135	134	138	240	11	5.9%	6.9%
874	Management & Other Business Consulting Services	182	342	342	375	508	17	4.0%	4.3%
88	HOUSEHOLD SERVICES	48	57	68	87	117	6	7.5%	3.9%
89	OTHER SERVICES	31	25	18	16	17	-1	-4.0%	0.4%
	GOVERNMENT	7,005	8,245	8,185	8,314	8,777	53	0.6%	0.5%
	TOTAL FEDERAL	1,791	1,849	1,794	1,839	1,714	-14	-0.8%	-0.8%
431	U.S. POSTAL SERVICE	532	635	633	610	616	-2	-0.3%	-0.3%
	OTHER FEDERAL	1,259	1,214	1,161	1,229	1,098	-12	-1.0%	-0.9%
	TOTAL STATE GOVERNMENT	1,118	1,524	1,529	1,530	1,763	24	1.5%	0.7%
822	STATE PUBLIC EDUCATIONAL SERVICES	575	800	838	848	1,082	28	3.1%	1.4%
	OTHER STATE GOVERNMENT	543	724	691	682	681	-4	-0.6%	0.2%
	TOTAL LOCAL GOVERNMENT	4,096	4,872	4,862	4,945	5,300	43	0.9%	0.7%
82	LOCAL PUBLIC EDUCATIONAL SERVICES	2,569	3,007	3,003	3,057	3,108	10	0.3%	0.4%
	OTHER LOCAL GOVERNMENT	1,527	1,865	1,859	1,888	2,192	33	1.6%	1.4%
	TOTAL PAYROLL JOBS	50,317	66,342	68,406	69,726	82,343	1,600	2.2%	1.7%
	SELF-EMPLOYMENT JOBS	14,505	16,960	17,540	17,876	20,208	325	1.8%	1.4%
01 & 02	AGRICULTURAL PRODUCTION, CROPS & LIVESTOCK	1,029	1,195	1,153	1,176	1,237	4	0.3%	0.2%
07-89	NONAGRICULTURAL SELF-EMPLOYED	13,476	15,765	16,387	16,700	18,971	321	1.9%	1.6%
	TOTAL JOBS (both payroll & self-employment)	64,822	83,302	85,946	87,602	102,551	1,925	2.1%	1.6%

*Standard Industrial Classification Code

D=Not Disclosable - fewer than three business establishments, or one establishment with 80 percent or more of an industry's employment, suppressed industry's jobs included in totals

Sources: Research & Analysis Bureau, Montana Department of Labor & Industry, Bureau of Economic Analysis, U.S. Department of Commerce for historical self-employment

jobs and historical payroll jobs for production agriculture and railroads, County Business Patterns published by the U.S. Bureau of the Census for jobs not covered by unemployment insurance (work-study jobs, clergy, etc.) private colleges, religious organizations and life insurance carriers

Economic highlights and employment outlook

Civilian labor force

Montana's civilian labor force averaged 477,000 for the second quarter of 2003—up 12,500 over the quarter, and up 10,700 over the year.

Employed

The number of Montanans employed during the quarter averaged 457,800—up 17,600 over

the quarter, and up 11,800 over the year.

Unemployed

The number of Montanans unemployed during the quarter averaged 19,200—down 5,100 over

the quarter, and down 1,100 over the year.

The average unemployment rate for the quarter was 4.0 percent—down 1.2 percentage points over the quarter, and down four-tenths of a percentage point over the year. ■

Quarterly Employment Trends

Quarter	Montana Civilian Labor Force*	MONTANA		Unemployment Rate (Montana)	UNITED STATES Unemployment Rate (U.S.)
		Montanans Employed	Montanans Unemployed		
2003-2nd	477,007	457,780	19,227	4.0%	6.1%
2003-1st	464,554	440,225	24,329	5.2%	6.3%
2002-4th	462,500	441,000	21,500	4.7%	5.6%
2002-3rd	469,100	451,800	17,300	3.7%	5.7%
2002-2nd	466,300	446,000	20,300	4.4%	5.7%

*Rounded Civilian Labor Force Numbers; †2003 Benchmark (Not Seasonally Adjusted)

Wage and salary jobs by industry sectors

(NOTE: Numbers may not total due to rounding.)

Total nonagricultural wage and salary employment in Montana averaged 399,700 jobs the second quarter of 2003—up about 13,800 jobs over the quarter, and up approximately 1,500 jobs over the year.

Natural resources and mining averaged 6,000 jobs—down 100 jobs over the quarter, and down 100 jobs over the year.

Construction averaged 22,200 jobs—up 3,300 jobs over the quarter, and up about 400 jobs over the year.

Manufacturing averaged 19,000 jobs—up 300 jobs over the quarter, but down about 900 over the year.

Trade, transportation and utilities averaged 84,400 jobs—up 2,100 jobs over the quarter, but down 700 jobs over the year.

Information averaged 8,000 jobs—up 100 jobs over the quarter, and also 100 jobs over the year.

Financial activities averaged

19,800—up 100 jobs over the quarter and up about 400 over the year, mostly in finance and insurance.

Professional and business services averaged 32,800 jobs—up 1,400 jobs over the quarter, and up 600 jobs over the year.

Educational and health services averaged 53,000 jobs—up 600 jobs over the quarter, and up about 800 over the year. (Health services jobs dominate this supersector, with private educational services accounting for only 3,800 jobs during second quarter 2003.)

Leisure & hospitality averaged 51,900 jobs—up about 3,400 jobs over the quarter, and up 600 jobs over the year.

Other services averaged 16,000 jobs—up approximately 100 jobs over the quarter, but down 100 jobs over the year.

Government averaged 86,500 jobs—up 2,400 jobs over the

quarter, and up about 300 jobs over the year.



Average weekly hours and earnings

Average weekly earnings for production workers averaged \$411.84 for the second quarter of 2003—up \$11.80 over the quarter, and up \$19.43 over the year.

Average weekly hours averaged 32.1—up seven-tenths of an hour over the quarter, and up four-tenths of an hour over the year.

Average hourly earnings averaged \$12.83 for the quarter—up 9 cents over the quarter, and up 49 cents over the year. ■

Industry news from around the state

(Gathered primarily from state newspaper reports)

Construction

•**Town Pump of Butte** is expanding. The company announced it will add a three-story, 13,500-square foot addition to its 10,500-square foot current headquarters across from Butte High School.

•**Building at Mountain View Plaza** in Kalispell continues at the corner of U.S. Highway 93 and Reserve Street. Some of the new tenants will be Borders, Gart Sports, Ross Dress for Less and TJ. Maxx.

•**A \$2.5 million expansion** at the Archie Bray in Helena will include a new resident studio facility for 10 year-round residents and for visiting artists. It will also house glaze, plaster and photography rooms.

•**Several hotel chains** have built facilities recently in Great Falls. The Hampton Inn is the latest joining Extended Stay America, La Quinta Inns & Suites, Crystal Inn and Holiday Inn Express.

Manufacturing

•**Semitool** laid off 120 workers at different facilities worldwide including Kalispell. Semitool designs, manufactures and supports machines used to make semiconductor devices.

•**Trout Creek Truss** has moved to Noxon. The enlarged quarters will allow the business to expand. The company buys its lumber from three Montana companies and from one in Idaho.

•**Bitterroot Valley's Painted Rocks Winery** is making mead and after only a year and a half in business is now found in 80 retail outlets in Montana.

•**Montana Legend Natural Angus Beef** recently opened in Roberts. The company is located in the old grain elevator and patrons can buy a steak or whole beef. The company also ships anywhere in the U.S. The company's president and chief operating officer said the company is focused on providing high-quality Angus beef without antibiotics or growth hormones.

•**Louisiana Pacific timber mill** gave 60-day notice to its 137 employees and announced its closure. The Belgrade mill was started in the early 1960s and was owned by Louisiana Pacific for the past 11 years.

•**Some folks in Fort Benton** are pleased that an Irish company which manufactures a fuel additive has chosen their city as their North American headquarters. Pendragon, makes PD5 fuel conditioner, said to increase fuel efficiency and make engines run cleaner.

Trade, Transportation & Utilities

•**Nationwide closure of 60 Eddie Bauer stores** won't affect the Missoula store. The chain has 529 stores in the U.S. and Canada and 57 more in Japan and Germany.

•**Security staff numbers are expected to decline** at Montana airfields. Preliminary reports suggest the state could lose up to 84 of its 293 employees. A Transportation Security Administration federal security director attributes the decline in employees to new machines at airports which help screen luggage and passengers.

•**West Yellowstone** now has a compost facility. A \$4.2 million state loan funded the facility which composts waste material from Yellowstone National Park and Hebgen Basin communities.

•**A chainsaw artist** has opened a new business in Drummond. The wood carver opened the Whispering Eagle Gallery.

•**A couple from Valier** has started an online business specializing in Montana-made products. The web address is BuyMontanaMade.com and anyone wishing to sell a Montana-made product can contact them.

•Great Northern Power Development of Denver and Kiewit Mining Group of Omaha announced plans for permitting and construction of coal-fired generating plants at Miles City and Dickinson, N.D. The projects are expected to provide 175 jobs and cost \$900 million each to construct.

•NAPA Auto and Truck Parts has opened a new store in Dillon's former Coast to Coast store.

Information

•Cutthroat Communications laid off 20 percent of its Bozeman workforce. The company offers broadband Internet services with high-security services to several Montana businesses.

•Touch America laid off 100 of its Montana workers citing continuing cash-flow problems.

Financial Activities

•Rocky Mountain Bank of Plains has a new building. The old building was torn down after 98 years and a new one constructed on the same site.

•First Interstate Bank of Bozeman proposed construction of a new bank on West Main in downtown. Officials hope construction will begin in June.

•Gallatin Commerce Bank, an independent bank, is scheduled to be built at the intersection of Kagy Boulevard and South 19th in Bozeman. A temporary location

should open in July.

Professional & Business Services

•Montana Legal Services Association (MLSA) opened an office in Cut Bank. The new business offers assistance to domestic violence victims and offers legal advice.

•L.A. Olson and Associates, an engineering and architectural firm, and Timberline Resources, an environmental and natural resource management firm, will move to downtown Billings from its Grand Avenue office space.

•A new Bozeman company is studying new ways of fighting cancerous tumors. Rasios Inc., was incorporated by a Montana State University Bozeman research chemist, Charles Spangler, with funds from a Seattle venture capital firm. A group of MSU scientists is experimenting with compounds, ingested by patients, that migrate to tumors and kill them after activation from a laser beam.

Educational & Health Services (*Private Education)

•Livingston's Memorial Hospital is being spruced up. Built in the late 1940s, the hospital is being painted inside and new tile installed near the emergency room.

•St. James Healthcare in Butte laid off 35 employees. The last hospital layoff was in 1995. Administrators

cited financial challenges for the recent reduction in staff.

•Missoula's International Heart Institute will debut at Anaconda's Community Hospital. The Heart Institute's presence will expand current cardiology services.

Leisure & Hospitality

•The Finlen in Butte restored its 100 year old Treasure State Ballroom. Owners said they wanted to create a space for celebrations, receptions and weddings for the Butte community.

•The Great Northern in Butte is being remodeled. Owners hope to complete work by July. The facility will offer an indoor stage and outdoor amphitheater for plays and bands.

•Krispy Kreme doughnuts plans to open in Billings. A Las Vegas spokesperson said the chain's store in Billings should open first quarter 2004. ■



TABLE 1-A
MONTANA MONTHLY LABOR FORCE BY COUNTY
LABOR FORCE STATISTICS

03 BMK
June 2003 (P)

COUNTY	CIVILIAN LABOR FORCE	EMPLOYED	UNEMPLOYED	UNEMPLOYMENT RATE
U.S. (in thousands)	148,117	138,468	9,649	6.5%
MONTANA	484,128	463,135	20,993	4.3%
YELLOWSTONE	75,371	72,801	2,570	3.4%
CASCADE	36,926	35,259	1,667	4.5%
MISSOULA	57,244	55,379	1,865	3.3%
BEAVERHEAD	4,862	4,695	167	3.4%
BIG HORN	5,408	4,565	843	15.6%
BLAINE	2,641	2,511	130	4.9%
BROADWATER	2,291	2,192	99	4.3%
CARBON	5,061	4,915	146	2.9%
CARTER	927	903	24	2.6%
CHOUTEAU	2,491	2,434	57	2.3%
CUSTER	5,676	5,544	132	2.3%
DANIELS	1,208	1,189	19	1.6%
DAWSON	4,774	4,670	104	2.2%
DEER LODGE	3,961	3,785	196	4.9%
FALLON	1,721	1,688	33	1.9%
FERGUS	5,965	5,699	266	4.5%
FLATHEAD	42,641	40,315	2,326	5.5%
GALLATIN	45,801	44,699	1,102	2.4%
GARFIELD	864	850	14	1.6%
GLACIER	6,018	5,283	735	12.2%
GOLDEN VALLEY	469	445	24	5.1%
GRANITE	1,123	1,059	64	5.7%
HILL	9,265	8,851	414	4.5%
JEFFERSON	5,087	4,842	245	4.8%
JUDITH BASIN	1,118	1,076	42	3.8%
LAKE	11,516	10,779	737	6.4%
LEWIS & CLARK	28,406	27,314	1,092	3.8%
LIBERTY	1,091	1,067	24	2.2%
LINCOLN	7,185	6,126	1,059	14.7%
MCCONE	1,206	1,190	16	1.3%
MADISON	4,602	4,473	129	2.8%
MEAGHER	904	864	40	4.4%
MINERAL	1,692	1,563	129	7.6%
MUSSELSHELL	1,872	1,768	104	5.6%
PARK	10,166	9,815	351	3.5%
PETROLEUM	295	285	10	3.4%
PHILLIPS	2,138	2,055	83	3.9%
PONDERA	3,113	2,929	184	5.9%
POWDER RIVER	1,220	1,204	16	1.3%
POWELL	2,465	2,321	144	5.8%
PRAIRIE	602	592	10	1.7%
RAVALLI	18,950	18,102	848	4.5%
RICHLAND	5,248	4,998	250	4.8%
ROOSEVELT	4,319	3,957	362	8.4%
ROSEBUD	4,633	4,322	311	6.7%
SANDERS	4,379	4,056	323	7.4%
SHERIDAN	2,003	1,944	59	2.9%
SILVER BOW	17,052	16,263	789	4.6%
STILLWATER	5,784	5,607	177	3.1%
SWEET GRASS	1,802	1,762	40	2.2%
TETON	3,352	3,244	108	3.2%
TOOLE	2,773	2,681	92	3.3%
TREASURE	355	346	9	2.5%
VALLEY	4,357	4,209	148	3.4%
WHEATLAND	1,099	1,057	42	3.8%
WIBAUX	610	593	17	2.8%
L & C/JEFFERSON LMA	33,493	32,156	1,337	4.0%

SOURCE: LOCAL AREA UNEMPLOYMENT STATISTICS (LAUS) DATA. SEE TECHNICAL NOTE S-1 ON "SOURCES OF DATA" PAGE AT BACK OF THIS PUBLICATION.



TABLE 1-B
MONTANA MONTHLY LABOR FORCE BY COUNTY
 LABOR FORCE STATISTICS

03 BMK
May 2003 (R)

COUNTY	CIVILIAN		UNEMPLOYMENT	
	LABOR FORCE	EMPLOYED	UNEMPLOYED	RATE
U.S. (in thousands)	146,067	137,567	8,500	5.8%
MONTANA	476,714	458,866	17,848	3.7%
YELLOWSTONE	75,139	73,186	1,953	2.6%
CASCADE	36,535	35,222	1,313	3.6%
MISSOULA	56,555	54,914	1,641	2.9%
BEAVERHEAD	4,883	4,716	167	3.4%
BIG HORN	5,065	4,393	672	13.3%
BLAINE	2,636	2,521	115	4.4%
BROADWATER	2,136	2,053	83	3.9%
CARSON	4,959	4,824	135	2.7%
CARTER	954	941	13	1.4%
CHOUTEAU	2,568	2,524	44	1.7%
CUSTER	5,739	5,626	113	2.0%
DANIELS	1,240	1,225	15	1.2%
DAWSON	4,850	4,774	76	1.6%
DEER LODGE	4,003	3,855	148	3.7%
FALLON	1,688	1,649	39	2.3%
FERGUS	6,035	5,826	209	3.5%
FLATHEAD	41,013	38,913	2,100	5.1%
GALLATIN	44,717	43,491	1,226	2.7%
GARFIELD	915	892	23	2.5%
GLACIER	5,262	4,717	545	10.4%
GOLDEN VALLEY	490	468	22	4.5%
GRANITE	1,095	1,011	84	7.7%
HILL	9,426	9,120	306	3.2%
JEFFERSON	4,993	4,818	175	3.5%
JUDITH BASIN	1,075	1,043	32	3.0%
LAKE	11,400	10,778	622	5.5%
LEWIS & CLARK	28,042	27,177	865	3.1%
LIBERTY	1,079	1,054	25	2.3%
LINCOLN	6,992	5,955	1,037	14.8%
MCCONE	1,195	1,179	16	1.3%
MADISON	3,874	3,752	122	3.1%
MEAGHER	927	878	49	5.3%
MINERAL	1,720	1,599	121	7.0%
MUSSELSHELL	1,907	1,807	100	5.2%
PARK	9,795	9,446	349	3.6%
PETROLEUM	286	276	10	3.5%
PHILLIPS	2,217	2,141	76	3.4%
PONDERA	3,187	3,064	123	3.9%
POWDER RIVER	1,193	1,177	16	1.3%
POWELL	2,476	2,347	129	5.2%
PRAIRIE	625	616	9	1.4%
RAVALLI	18,747	18,019	728	3.9%
RICHLAND	5,225	4,998	227	4.3%
ROOSEVELT	4,320	4,076	244	5.6%
ROSEBUD	4,835	4,582	253	5.2%
SANDERS	4,271	3,986	285	6.7%
SHERIDAN	2,023	1,972	51	2.5%
SILVER BOW	16,480	15,829	651	4.0%
STILLWATER	5,613	5,471	142	2.5%
SWEET GRASS	1,829	1,794	35	1.9%
TETON	3,305	3,227	78	2.4%
TOOLE	2,798	2,731	67	2.4%
TREASURE	390	381	9	2.3%
VALLEY	4,324	4,211	113	2.6%
WHEATLAND	1,100	1,065	35	3.2%
WIBAUX	568	553	15	2.6%
L & C/JEFFERSON LMA	33,035	31,995	1,040	3.1%

SOURCE: LOCAL AREA UNEMPLOYMENT STATISTICS (LAUS) DATA. SEE TECHNICAL NOTES FOR SOURCE OF DATA SERIES AT BACK OF THIS PUBLICATION.



TABLE 1-C
MONTANA MONTHLY LABOR FORCE BY COUNTY
 LABOR FORCE STATISTICS

03 BMK
 April 2003 (R)

COUNTY	CIVILIAN		UNEMPLOYMENT	
	LABOR FORCE	EMPLOYED	UNEMPLOYED	RATE
U.S. (in thousands)	145,925	137,424	8,501	5.8%
MONTANA	470,178	451,338	18,840	4.0%
YELLOWSTONE	72,810	70,962	1,848	2.5%
CASCADE	37,770	36,522	1,248	3.3%
MISSOULA	55,933	54,054	1,879	3.4%
BEAVERHEAD	4,731	4,560	171	3.6%
BIG HORN	4,880	4,179	701	14.4%
BLAINE	2,642	2,510	132	5.0%
BROADWATER	2,080	2,006	74	3.6%
CARBON	4,734	4,587	147	3.1%
CARTER	913	890	23	2.5%
CHOUTEAU	2,461	2,418	43	1.7%
CUSTER	5,833	5,674	159	2.7%
DANIELS	1,225	1,192	33	2.7%
DAWSON	4,997	4,902	95	1.9%
DEER LODGE	3,965	3,782	183	4.6%
FALLON	1,652	1,612	40	2.4%
FERGUS	5,990	5,751	239	4.0%
FLATHEAD	40,241	38,113	2,128	5.3%
GALLATIN	44,960	43,762	1,198	2.7%
GARFIELD	857	835	22	2.6%
GLACIER	4,703	4,234	469	10.0%
GOLDEN VALLEY	477	443	34	7.1%
GRANITE	1,154	1,061	93	8.1%
HILL	9,521	9,225	296	3.1%
JEFFERSON	4,939	4,777	162	3.3%
JUDITH BASIN	1,095	1,049	46	4.2%
LAKE	11,032	10,347	685	6.2%
LEWIS & CLARK	27,856	26,945	911	3.3%
LIBERTY	1,023	993	30	2.9%
LINCOLN	7,073	5,907	1,166	16.5%
MCCONE	1,133	1,098	35	3.1%
MADISON	3,598	3,443	155	4.3%
MEADHER	947	895	52	5.5%
MINERAL	1,546	1,413	133	8.6%
MUSSELSHELL	1,814	1,707	107	5.9%
PARK	9,563	9,099	464	4.9%
PETROLEUM	287	280	7	2.4%
PHILLIPS	2,107	2,024	83	3.9%
PONDERA	3,072	2,953	119	3.9%
POWDER RIVER	1,153	1,119	34	2.9%
POWELL	2,481	2,344	137	5.5%
PRAIRIE	653	636	17	2.6%
RAVALLI	18,509	17,651	858	4.6%
RICHLAND	5,305	5,051	254	4.8%
ROOSEVELT	3,971	3,753	218	5.5%
ROSEBUD	4,466	4,217	249	5.6%
SANDERS	4,233	3,857	376	8.9%
SHERIDAN	1,999	1,930	69	3.5%
SILVER BOW	16,437	15,759	678	4.1%
STILLWATER	5,480	5,359	121	2.2%
SWEET GRASS	1,666	1,618	48	2.9%
TETON	3,162	3,071	91	2.9%
TOOLE	2,771	2,686	85	3.1%
TREASURE	421	405	16	3.8%
VALLEY	4,184	4,068	116	2.8%
WHEATLAND	1,073	1,033	40	3.7%
WIBAUX	602	579	23	3.8%
L & C/JEFFERSON LMA	32,795	31,722	1,073	3.3%

SOURCE: LOCAL AREA UNEMPLOYMENT STATISTICS (LAUS) DATA. SEE TECHNICAL NOTE S-1 ON "SOURCES OF DATA" PAGE AT BACK OF THIS PUBLICATION.



TABLE II
MONTANA CURRENT POPULATION SURVEY STATISTICS
(IN THOUSANDS)

2000 ANNUAL DATA (Preliminary)	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
CIVILIAN LABOR FORCE 1/	462.1	463.2	463.0	471.2	476.7	484.1							
EMPLOYED PERSONS	438.0	440.2	442.1	451.1	458.4	463.1							
LABOR MANAGEMENT DISPUTE 2/	0.0	0.0	0.0	0.0	0.0	0.0							
PERSONS EMPLOYED IN AGRICULTURE 3/	24.7	24.4	27.9	27.1	26.0	27.7							
UNEMPLOYED PERSONS	24.1	24.0	23.9	21.9	17.4	21.0							
% OF LABOR FORCE UNADJUSTED 4/	5.2	5.2	5.1	4.7	3.6	4.3							
% OF LABOR FORCE SEASONALLY ADJ 4/	4.3	4.0	4.2	4.0	3.4	3.5							
U.S. UNADJUSTED	6.5	6.4	6.2	5.8	5.0	5.3							
U.S. SEASONALLY ADJUSTED	5.7	5.8	5.8	6.1	5.1	6.4							

2002 ANNUAL DATA	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
CIVILIAN LABOR FORCE 1/	458.1	458.1	459.3	461.6	464.4	472.1	475.3	479.7	481.4	483.8	485.0	486.1	468.9
EMPLOYED PERSONS	429.4	431.0	433.0	441.1	445.5	451.4	458.1	454.0	444.9	444.3	441.0	438.7	442.2
LABOR MANAGEMENT DISPUTE 2/	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PERSONS EMPLOYED IN AGRICULTURE 3/	28.1	25.7	33.0	38.5	30.0	41.5	38.7	41.2	37.7	35.3	34.6	38.5	34.1
UNEMPLOYED PERSONS	25.9	26.0	26.3	21.5	18.9	20.6	17.2	16.2	16.5	19.3	21.8	20.4	21.4
% OF LABOR FORCE UNADJUSTED 3/	5.7	5.6	5.7	4.7	4.1	4.4	3.6	3.4	3.6	4.2	4.7	4.3	4.6
% OF LABOR FORCE SEASONALLY ADJ 3/	4.6	4.6	4.8	4.6	4.6	4.7	4.6	4.4	4.5	4.6	4.7	4.7	4.6
U.S. UNADJUSTED	6.0	6.1	6.1	5.7	5.3	6.0	5.3	5.7	5.4	5.3	5.6	5.7	5.8
U.S. SEASONALLY ADJUSTED	5.6	5.6	5.7	5.9	5.8	5.8	5.8	5.8	5.7	5.8	5.9	6.0	5.8

2001 ANNUAL DATA	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
CIVILIAN LABOR FORCE 1/	463.1	463.0	463.2	464.9	466.0	471.0	477.5	480.0	458.1	458.3	476.6	455.2	463.5
EMPLOYED PERSONS	436.4	436.0	437.5	443.1	446.6	450.8	454.5	450.0	440.9	419.2	436.1	431.9	442.0
LABOR MANAGEMENT DISPUTE 2/	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PERSONS EMPLOYED IN AGRICULTURE 3/	36.4	34.6	36.3	43.4	44.8	49.6	56.7	50.0	54.4	52.9	45.6	40.9	46.0
UNEMPLOYED PERSONS	26.6	27.1	25.7	21.8	19.4	20.2	13.0	13.0	17.2	19.1	21.5	23.4	21.5
% OF LABOR FORCE UNADJUSTED 3/	5.7	5.8	5.5	4.7	4.2	4.3	2.7	2.7	3.8	4.2	4.5	5.1	4.6
% OF LABOR FORCE SEASONALLY ADJ 3/	4.7	4.6	4.6	4.7	4.4	4.6	4.0	4.0	4.7	4.6	4.7	4.7	4.6
U.S. UNADJUSTED	4.7	4.6	4.5	4.2	4.1	4.7	4.0	4.0	4.7	5.0	5.3	5.4	4.7
U.S. SEASONALLY ADJUSTED	4.1	4.2	4.2	4.4	4.4	4.6	4.6	4.9	5.0	5.4	5.6	5.8	4.8

2000 ANNUAL DATA	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
CIVILIAN LABOR FORCE 1/	461.2	472.6	476.3	478.1	481.1	485.9	481.1	455.3	474.6	471.4	468.8	465.4	476.5
EMPLOYED PERSONS	440.2	442.9	448.3	454.4	459.4	463.1	460.0	465.7	455.3	450.6	445.8	438.7	452.9
LABOR MANAGEMENT DISPUTE 2/	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PERSONS EMPLOYED IN AGRICULTURE 3/	41.9	36.8	38.8	43.1	43.2	42.6	41.3	42.3	46.7	48.0	36.5	36.1	41.5
UNEMPLOYED PERSONS	29.1	29.7	28.1	23.7	21.7	22.8	22.1	19.7	19.3	20.8	23.0	23.7	23.6
% OF LABOR FORCE UNADJUSTED 3/	6.2	6.3	5.9	5.0	4.5	4.7	4.6	4.1	4.1	4.4	4.9	5.2	5.0
% OF LABOR FORCE SEASONALLY ADJ 3/	5.1	5.0	5.0	5.0	5.0	5.0	5.0	4.8	4.9	4.9	4.6	5.1	5.0
U.S. UNADJUSTED	4.5	4.4	4.3	3.7	3.8	4.0	4.7	4.1	3.8	3.6	3.7	3.7	4.0
U.S. SEASONALLY ADJUSTED	4.0	4.0	4.0	3.9	4.0	4.0	4.1	4.0	4.0	3.6	3.6	3.9	4.0

1/ ESTIMATES BASED ON NATIONAL HOUSEHOLD SAMPLE CENSUS AND U.S. BUREAU OF ECONOMIC ANALYSIS (BUREAU OF ECONOMIC ANALYSIS)

2/ UNPAID FAMILY AND DOMESTIC WORKERS CURRENT MONTH PRELIMINARY 3/ REVIEWED TO 1993 BENCHMARK

3/ NONADDITIVE INCLUDED IN TOTAL EMPLOYMENT

4/ COMPUTED FROM WHOLE (UNROUNDED) NUMBERS REFERENCE SERIES BEGAN IN JANUARY 1994

5/ SOURCE: LOCAL AREA UNEMPLOYMENT STATISTICS AND DATA (SEE TECHNICAL NOTES) 6/ AVERAGE OF 12 MONTHS OF DATA PAGE A) BACK OF THIS PUBLICATION



TABLE III
MONTANA
STATEWIDE PAYROLL EMPLOYMENT BY INDUSTRY
(IN THOUSANDS)

2003 (Preliminary)

02 BM

(ESTABLISHMENT DATA)	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
TOTAL NONAGRICULTURAL PAYROLL JOBS	384.7	386.5	386.4	393.1	401.2	404.9							
TOTAL PRIVATE	302.6	301.6	301.0	306.8	313.3	319.4							
GOODS PRODUCING	44.4	43.5	43.3	45.3	47.2	49.1							
SERVICE PROVIDING	340.3	343.0	343.1	347.8	354.0	355.8							
NATURAL RESOURCES* & MINING	6.2	6.2	6.0	5.8	5.9	6.4							
MINING	5.0	5.0	5.0	4.9	4.9	5.1							
CONSTRUCTION	19.3	18.7	18.8	20.8	22.3	23.7							
CONSTRUCTION OF BUILDINGS	6.1	5.9	5.5	6.3	6.6	6.8							
HEAVY AND CIVIL ENGINEERING	3.2	3.1	3.4	4.1	4.5	4.8							
SPECIALTY TRADE CONTRACTORS	10.0	9.7	9.9	10.4	11.2	12.1							
MANUFACTURING	18.9	18.6	18.5	18.7	19.0	19.0							
DURABLE GOODS	12.3	12.2	12.3	12.4	12.6	12.5							
WOOD PRODUCT MANUFACTURING	4.9	4.9	4.9	4.9	5.0	5.0							
NONDURABLE GOODS	6.6	6.4	6.2	6.3	6.4	6.5							
TRADE, TRANS. & UTILITIES	83.1	82.1	81.8	83.3	84.3	85.1							
WHOLESALE TRADE	15.2	15.0	15.1	15.5	15.5	15.5							
RETAIL TRADE	52.4	51.9	51.5	52.6	53.4	54.1							
TRANS. WAREHOUSE & UTILITIES	15.5	15.2	15.2	15.2	15.4	15.5							
INFORMATION	7.8	7.9	7.9	8.0	8.0	8.1							
FINANCIAL ACTIVITIES	19.6	19.8	19.6	19.7	19.8	20.0							
PROFESSIONAL & BUSINESS SERV.	31.2	31.5	31.4	32.3	33.0	32.9							
EDUCATION** & HEALTH SERVICES	52.3	52.4	52.4	52.9	53.4	53.0							
EDUCATIONAL SERVICES	3.7	3.9	3.8	3.9	4.0	3.7							
HEALTH CARE & SOCIAL SERVICES	48.6	48.5	48.6	49.0	49.4	49.3							
LEISURE & HOSPITALITY	48.3	48.6	48.7	49.4	51.4	55.0							
ACCOMMODATION	8.5	8.6	8.7	8.6	9.4	10.9							
FOOD SERV. & DRINKING PLACES	31.7	31.9	31.9	32.4	33.4	34.1							
OTHER SERVICES	15.9	15.8	15.9	15.9	16.2	16.2							
TOTAL GOVERNMENT	82.1	84.9	85.4	86.3	87.9	85.5							
TOTAL FEDERAL GOVERNMENT	12.1	12.1	12.3	12.6	13.3	14.9							
TOTAL STATE GOVERNMENT***	23.2	24.8	25.2	25.8	25.3	24.0							
TOTAL LOCAL GOVERNMENT****	46.8	48.0	47.9	47.9	49.3	46.6							

*Logging

**Private education

***State government includes state university/college staff and student workers.

****Local government includes public education, K-12.

SOURCE: CURRENT EMPLOYMENT STATISTICS (CES) DATA. SEE TECHNICAL NOTE S-4 ON "SOURCES OF DATA" PAGE AT BACK OF THIS PUBLICATION.
ALSO REFERENCE CES-790 PROGRAM DEFINITION ON "GLOSSARY OF TERMS" PAGE

TABLE IV

METROPOLITAN STATISTICAL AREA (MSA)# PAYROLL EMPLOYMENT BY INDUSTRY (IN THOUSANDS)

2003 (Preliminary)

02 BM

(ESTABLISHMENT DATA)	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
BILLINGS MSA (Yellowstone County)													
TOTAL NONAGRICULTURAL	68.4	68.1	68.4	68.4	70.6	70.6							
TOTAL PRIVATE	59.5	59.5	59.4	59.4	61.4	61.4							
GOODS PRODUCING	5.8	5.8	5.8	5.8	5.8	5.8							
SERVICE PROVIDING	53.6	53.6	53.6	53.6	55.6	55.6							
NAT. RESOURCES* MINING & CONST.	2.4	2.4	2.4	2.4	2.4	2.4							
MANUFACTURING	3.4	3.4	3.4	3.4	3.4	3.4							
TRADE, TRANS. & UTILITIES	11.8	11.8	11.8	11.8	11.8	11.8							
WHOLESALE TRADE	5.4	5.4	5.4	5.4	5.4	5.4							
RETAIL TRADE	6.4	6.4	6.4	6.4	6.4	6.4							
TRANS. WAREHOUSING & UTIL.	0.0	0.0	0.0	0.0	0.0	0.0							
INFORMATION	0.0	0.0	0.0	0.0	0.0	0.0							
FINANCIAL ACTIVITIES	0.0	0.0	0.0	0.0	0.0	0.0							
PROFESSIONAL & BUSINESS SER./	0.0	0.0	0.0	0.0	0.0	0.0							
EDUCATION** & HEALTH SERVICES	0.0	0.0	0.0	0.0	0.0	0.0							
LEISURE & HOSPITALITY	0.0	0.0	0.0	0.0	0.0	0.0							
OTHER SERVICES	0.0	0.0	0.0	0.0	0.0	0.0							
TOTAL GOVERNMENT	8.4	8.4	8.4	8.4	8.4	8.4							
TOTAL FEDERAL GOVERNMENT	0.0	0.0	0.0	0.0	0.0	0.0							
TOTAL STATE GOVERNMENT***	0.0	0.0	0.0	0.0	0.0	0.0							
TOTAL LOCAL GOVERNMENT****	0.0	0.0	0.0	0.0	0.0	0.0							
MISSOULA MSA (Missoula County)													
TOTAL NONAGRICULTURAL	40.4	40.4	40.4	40.4	40.4	40.4							
TOTAL PRIVATE	41.4	41.4	41.4	41.4	41.4	41.4							
GOODS PRODUCING	0.0	0.0	0.0	0.0	0.0	0.0							
SERVICE PROVIDING	41.4	41.4	41.4	41.4	41.4	41.4							
NAT. RESOURCES* MINING & CONST.	0.0	0.0	0.0	0.0	0.0	0.0							
MANUFACTURING	0.0	0.0	0.0	0.0	0.0	0.0							
TRADE, TRANS. & UTILITIES	11.4	11.4	11.4	11.4	11.4	11.4							
WHOLESALE TRADE	5.4	5.4	5.4	5.4	5.4	5.4							
RETAIL TRADE	6.4	6.4	6.4	6.4	6.4	6.4							
TRANS. WAREHOUSING & UTIL.	0.0	0.0	0.0	0.0	0.0	0.0							
INFORMATION	0.0	0.0	0.0	0.0	0.0	0.0							
FINANCIAL ACTIVITIES	0.0	0.0	0.0	0.0	0.0	0.0							
PROFESSIONAL & BUSINESS SER./	0.0	0.0	0.0	0.0	0.0	0.0							
EDUCATION** & HEALTH SERVICES	0.0	0.0	0.0	0.0	0.0	0.0							
LEISURE & HOSPITALITY	0.0	0.0	0.0	0.0	0.0	0.0							
OTHER SERVICES	0.0	0.0	0.0	0.0	0.0	0.0							
TOTAL GOVERNMENT	0.0	0.0	0.0	0.0	0.0	0.0							
TOTAL FEDERAL GOVERNMENT	0.0	0.0	0.0	0.0	0.0	0.0							
TOTAL STATE GOVERNMENT***	0.0	0.0	0.0	0.0	0.0	0.0							
TOTAL LOCAL GOVERNMENT****	0.0	0.0	0.0	0.0	0.0	0.0							

*Logging

**Private education

***State government includes state university college staff and student workers.

****Local government includes public education, K-12

A large county Metropolitan Statistical Area (MSA) is defined as the core county containing the county seat and public urban area, and an urbanized area with a population of at least 50,000. In Montana, the MSA is defined as the county containing the county seat and public urban area.

SOURCE: CURRENT EMPLOYMENT STATISTICS BY INDUSTRY, U.S. DEPARTMENT OF COMMERCE, BUREAU OF ECONOMIC ANALYSIS, MONTHLY LABOR REPORT, PUBLISHED MONTHLY. DATA ARE PRELIMINARY AND SUBJECT TO REVISION.



TABLE V MONTANA STATEWIDE FEMALE PAYROLL EMPLOYMENT BY INDUSTRY (IN THOUSANDS)

2003 (Preliminary)

02 BM

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
(ESTABLISHMENT DATA)													
TOTAL NONFARM	197.2	198.6	198.2	200.6	205.0	205.7							
TOTAL PRIVATE	151.7	151.6	150.9	152.8	156.5	159.6							
GOODS PRODUCING	7.8	7.9	7.5	7.5	7.7	8.3							
SERVICE-PROVIDING	189.4	190.7	190.6	193.1	197.4	197.4							
NAT. RESOURCES* & MINING	0.5	0.5	0.5	0.5	0.6	0.5							
CONSTRUCTION	2.6	2.7	2.6	2.6	2.9	3.2							
MANUFACTURING	4.7	4.7	4.4	4.3	4.3	4.6							
TRADE, TRANS. & UTILITIES	33.8	32.9	32.9	33.3	34.4	35.0							
INFORMATION	3.5	3.6	3.6	3.6	3.8	3.9							
FINANCIAL ACTIVITIES	13.4	13.6	13.3	13.3	13.3	13.3							
PROF. & BUSINESS SERV.	15.7	16.2	15.9	16.4	16.5	16.4							
EDUCATION** & HEALTH SERV.	39.5	39.5	39.6	39.9	40.1	40.3							
LEISURE & HOSPITALITY	28.3	28.5	28.4	29.3	31.2	32.7							
OTHER SERVICES	9.6	9.4	9.6	9.6	9.6	9.6							
TOTAL GOVERNMENT***	45.5	47.0	47.3	47.8	48.5	46.1							

*Logging

**Private education

***Total government includes state university/college staff, student workers and public education, K-12.

FEMALE EMPLOYMENT IS PRODUCED BY THE MONTANA DEPARTMENT OF LABOR AND INDUSTRY FOR USE AS A STATE ECONOMIC INDICATOR

SOURCE: CURRENT EMPLOYMENT STATISTICS (CES) DATA. SEE TECHNICAL NOTE S-5 ON "SOURCES OF DATA" PAGE AT BACK OF THIS PUBLICATION. ALSO REFERENCE CES-790 PROGRAM DEFINITION ON "GLOSSARY OF TERMS" PAGE

TABLE VI
MONTANA HOURS & EARNINGS

For Private Nonagricultural Production Worker

TABLE VII
THE CONSUMER PRICE INDEX - U.S.
NOT SEASONALLY ADJUSTED

ALL ITEMS
(1982-1984 = 100)

	2003		2002		2001	
	CPI-U	CPI-W	CPI-U	CPI-W	CPI-U	CPI-W
January	181.7	177.7	177.1	173.2	175.1	171.7
February	183.1	179.2	177.8	173.7	175.8	172.4
March	184.2	180.3	178.8	174.7	176.2	172.6
April	183.8	179.8	179.8	175.8	176.9	173.5
May	183.5	179.4	179.8	175.8	177.7	174.4
June	183.7	179.6	179.9	175.9	178.0	174.6
July			180.1	176.1	177.5	173.8
August			180.7	176.6	177.5	173.8
September			181.0	177.0	178.3	174.8
October			181.3	177.3	177.7	174.0
November			181.3	177.4	177.4	173.7
December			180.9	177.0	176.7	172.9
Dec-to-Dec %			2.4%	2.4%	1.6%	1.3%
ANNUAL AVERAGE:			179.9	175.9	177.1	173.5
Ann Avg %			1.6%	1.4%	2.8%	2.7%

Expenditure Category CPI-U Index	Relative Importance	% Change From			Ann Average %	
		June 2003	May 2003	June 2002	2002	2001
ALL ITEMS	100%	183.7	0.1%	2.1%	1.6%	2.8%
Food & Beverages	16%	180.2	0.4%	2.2%	1.8%	3.1%
Housing	40%	185.3	0.4%	2.5%	2.2%	4.0%
Apparel	5%	119.5	-2.4%	-2.6%	-2.6%	-1.8%
Transportation	17%	156.8	-0.3%	2.2%	-0.9%	0.7%
Medical Care	6%	296.3	0.3%	4.1%	4.7%	4.6%
Recreation	6%	107.6	0.0%	1.3%	1.2%	1.5%
Education and Communication	5%	108.5	-0.1%	1.5%	2.6%	2.6%
Other Goods & Services	5%	298.1	0.0%	1.3%	3.8%	4.2%

Purchasing Power Of Consumer Dollar:	June 2003	May 2003	June 2002	Ann Average	
				2002	2001
(1982-84 = \$1.00)	\$0.54	\$0.54	\$0.56	\$0.56	\$0.56

THE CONSUMER PRICE INDEX (CPI) IS A MEASURE OF THE AVERAGE CHANGE IN THE PRICES PAID BY URBAN CONSUMERS FOR A FIXED MARKET BASKET OF GOODS AND SERVICES. THE CPI IS CALCULATED MONTHLY FOR TWO POPULATION GROUPS, ONE CONSISTING ONLY OF THE URBAN HOUSEHOLDS WHOSE PRIMARY SOURCE OF INCOME IS DERIVED FROM THE EMPLOYMENT OF WAGE EARNERS AND CLERICAL WORKERS (CPI-W). AS NEW USES WERE DEVELOPED FOR THE CPI IN RECENT YEARS, THE NEED FOR A BROADER AND MORE REPRESENTATIVE INDEX BECAME APPARENT. THE ALL-URBAN CONSUMER INDEX (CPI-U), INTRODUCED IN 1978, IS REPRESENTATIVE OF THE 1982-84 BUYING HABITS OF ABOUT 80% OF THE NONINSTITUTIONAL POPULATION, COMPARED WITH 32% REPRESENTED IN CPI-W.

➤ SOURCE FOR DATA: SEE TECHNICAL NOTE S-6 ON "SOURCES OF DATA" PAGE AT BACK OF THIS PUBLICATION

Note: The Bureau of Labor Statistics has begun using a new formula for calculating the basic components of the CPI-U and the CPI-W effective with the data starting January 1999.

TABLE VIII
Unemployment Insurance

	Initial Claims											
	2003	2002	2001	2000	1999	1998	1997	1996	1995	1994	1993	1992
January	6,268	6,393	6,098	5,977	5,915	6,749	7,546	7,495	6,588	6,591	8,057	8,594
February	3,618	3,147	3,200	3,088	3,108	3,214	3,270	3,938	3,370	3,666	3,170	3,265
March	3,496	3,542	2,700	2,352	2,793	3,220	2,724	2,869	3,002	2,948	2,784	2,881
April	3,496	3,726	2,862	2,354	2,941	2,916	3,360	2,826	2,948	3,081	2,829	2,949
May	2,380	2,266	2,085	1,944	1,982	1,913	2,075	2,351	2,333	2,265	2,033	2,129
June	2,887	2,221	1,982	1,993	2,252	2,449	2,280	2,222	2,669	2,470	2,120	2,484
July		2,250	2,512	2,594	2,029	2,143	2,337	2,254	2,281	3,317	2,246	2,423
August		1,729	1,850	2,101	1,535	1,596	1,680	1,631	1,842	1,662	1,466	1,650
September		1,773	1,529	2,307	1,544	1,740	1,700	1,825	1,579	1,626	1,744	1,758
October		3,506	3,606	2,983	2,689	3,580	3,142	3,392	3,245	2,943	2,860	2,822
November		4,549	4,159	3,618	3,378	3,997	3,802	4,604	4,835	4,100	4,454	3,215
December		5,004	4,243	4,678	4,065	4,952	4,851	4,883	5,036	4,226	4,365	4,408

Continued Claims

	2003	2002	2001	2000	1999	1998	1997	1996	1995	1994	1993	1992
January	53,085	53,709	51,419	52,211	54,354	47,781	57,513	60,632	56,167	52,265	48,165	47,135
February	53,784	52,948	48,992	46,555	48,595	48,151	56,567	59,295	56,942	56,866	49,313	48,102
March	64,009	59,681	47,135	41,532	NA*	57,371	62,496	58,121	53,936	63,207	59,540	53,621
April	42,019	49,457	45,509	34,927	34,300	36,484	44,463	50,358	41,202	42,379	38,521	36,493
May	34,501	31,990	29,687	25,446	30,514	31,079	31,603	34,556	40,259	36,461	30,593	28,913
June	35,666	30,053	25,539	20,656	26,803	26,824	31,786	31,675	29,430	33,520	31,912	31,106
July		26,277	30,168	24,331	22,030	22,862	25,500	30,194	28,631	26,980	25,848	27,169
August		21,981	23,194	20,976	24,426	24,425	23,702	23,881	29,528	29,753	27,711	24,322
September		21,891	20,999	18,885	16,430	17,119	18,950	22,763	20,188	20,614	20,279	22,937
October		21,278	22,919	22,845	19,136	18,228	18,075	22,312	24,457	20,779	20,592	20,689
November		31,258	29,689	27,563	25,507	33,293	27,425	30,126	33,400	35,450	34,318	26,202
December		51,251	48,795	41,649	32,538	37,779	38,941	54,332	41,797	39,504	43,370	42,284

*NA=not available

Trust Fund Growth Over Last Year (%)

	2003	2002	2001	2000	1999	1998	1997	1996	1995	1994	1993	1992
January	9.8	8.2	6.7	7.5	10.0	7.7	7.1	7.4	5.2	10.2	6.3	-1.6
February	11.7	9.4	4.4	10.1	9.4	9.5	3.2	9.2	7.7	7.3	9.8	-1.7
March	0.2	18.4	5.4	10.1	12.1	10.5	9.7	9.4	9.3	7.5	8.5	-1.2
April	-1.9	12.5	10.1	8.7	10.0	10.1	4.8	7.8	10.4	2.6	11.1	3.9
May	0.8	10.6	8.5	10.3	9.0	12.2	5.3	4.1	10.9	4.5	11.1	5.6
June	-1.0	10.1	8.4	13.4	9.6	11.9	3.5	6.0	10.6	6.8	5.5	5.2
July		9.3	10.0	9.8	4.6	14.0	2.6	3.0	11.3	4.1	6.8	7.9
August		9.3	8.4	8.4	9.4	11.2	4.7	4.6	10.2	6.0	6.6	7.3
September		9.6	7.7	10.4	9.6	11.5	3.2	6.1	10.5	5.8	7.0	6.3
October		11.4	8.3	6.3	8.5	10.9	4.4	6.1	10.4	7.0	6.9	6.4
November		11.5	7.6	6.2	10.0	9.7	5.9	6.1	7.9	6.7	7.6	9.4
December		11.1	6.9	7.8	10.5	10.1	7.6	4.2	8.1	7.2	7.4	7.6

Source: This table was prepared by the Montana Department of Labor and Industry, Research and Analysis Bureau. Unemployment Insurance claims and payments data was derived from the ETA 5-159 (Employment and Training Administration Claims and Payment Activities) report. Trust Fund Growth data was derived from the ETA 2-112 (Employment and Training Administration Unemployment Insurance Financial Transaction Summary) report.

Benchmarking

Data included in this publication reflect the current benchmarks for the nonagricultural wage and salary employment series and the labor force series. The annual tables included in this publication also reflect these benchmarks.

A benchmark is a point of reference from which measurement can be made, or upon which adjustments are based.

The two series are estimated differently:

(1) The level of nonagricultural wage and salary employment is based on an estimate of the month-to-month change in an established level of employment.

The benchmark is a reasonably complete count of the number of all employees in an industry at a specific point in time, and sets the level of employment from which the month-to-month change is measured. The base of the benchmark is the ES-202, which is a complete count of all employees covered by Montana unemployment insurance laws. The ES-202 is adjusted by special surveys to include employees not covered by unemployment insurance laws.

Nonagricultural wage and salary employment estimates are compared to the ES-202 on an annual basis and adjusted accordingly (benchmarked) for estimation errors that may have occurred due to sample error, changes in industrial classification of individual firms, the presence of noncovered employees and the opening or closing of businesses.

(2) Statewide labor force data is derived from a monthly sample of households conducted by the U.S. Census Bureau for the U.S. Department of Labor. Known as the Current Population Survey (CPS), this data is designed to be statistically significant on a monthly basis for the nation. States with small populations, however, do not have a large enough sample to ensure reliability on a monthly basis. This is the main reason for benchmarking the labor force series in Montana. The labor force series also includes the benchmarked nonagricultural wage and salary employment by industry in its benchmarking process. Revisions to the labor force series is normally limited to the preceding three years. Occasionally, a longer benchmark is warranted. For instance, the 1990-95 labor force series was revised in 1997 to incorporate census data revisions.

Reliability of CES estimates

The Current Employment Statistics (CES) uses sample-based estimates. Differences between the CES estimates and benchmarked data may be caused by sampling error, changes in industry classification of businesses, or openings and closings of businesses. Thus, the CES estimates are adjusted each year during the benchmark process (*see benchmarking explanation above*).

Glossary of terms

1. Civilian Labor Force - the number of persons 16 years and older, defined as employed or unemployed, excluding members of the armed forces.
2. Employed - those persons who work for pay or profit during a week or, as unpaid family workers who work 15 hours or more during a week. Also included as employed are those who, although not working, had some job attachment and were not looking for work, including persons temporarily absent from a job due to illness, bad weather, vacation, or labor dispute, whether or not they were in a pay status during their time off.

3.Unemployed - those persons who, for an entire week, did not work at all, were able to work and available for work, and (1) were looking for work or (2) would have looked for work except that (a) they were waiting to return to a job from which they had been laid off, or (b) they were waiting to report to a new wage and salary job scheduled to start within the following 30 days (and were not in school during the week).

4.Unemployment Rate - the number of unemployed expressed as a percent of the civilian labor force.

5.Residence Data - a count of people by where people live.

6.Establishment Data - a count of jobs by where people work.

7.Seasonally Adjusted Labor Force Series - to facilitate the evaluation of the labor force, recurrent yearly movements have been isolated and removed using the X-12 ARIMA method of seasonal adjustment. This is the same method used by the Bureau of Labor Statistics to seasonally adjust the national labor force series.

8.MSA - Metropolitan Statistical Area - as determined by the Office of Management and Budget. The MSA must have a central city with a population of 50,000 or more.

9.LFA - Labor Force Area as determined by the Research and Analysis Bureau, Montana Department of Labor and Industry, consists of a central city or cities with a population of less than 50,000 and the economically integrated geographical area surrounding it.

10.LWIA - The enactment of the Workforce Investment Act (WIA) of 1998 was the first wholesale reform of the nation's job training system in more than 15 years. Montana's State Workforce Investment Board was created by the governor in response to this act and its first task was to certify the local workforce investment areas (LWIA), which are guided by local workforce investment boards (these local boards replaced JTPA's Private Industry Councils). The two LWIAs for Montana are known as Rural Concentrated Employment Program, or CEP (Beaverhead, Broadwater, Deer Lodge, Granite, Jefferson, Lewis & Clark, Madison, Meagher, Powell, and Silver Bow counties), and Balance of State (the other 46 counties).

11.BENCHMARKING - is a continuous process of establishing a new set of data which affects the series of estimates through revisions. Once a new benchmark is established, the adjustments to estimates between the new benchmark and the preceding one are carried forward progressively to the current month by use of sample trends. The benchmark is established less frequently (usually once a year) based on sample or secondary data. In the case of employment data, the benchmark is used to establish the level of employment, while the sample is primarily used to measure the month-to-month changes in the level.

12.CES-790 Program - Current employment statistics survey produces monthly estimates of a wide variety of employment and earnings information for the nation, each state and Metropolitan Statistical Areas (MSAs). Because this information comes from a survey of employers, persons who work for two different companies would be counted twice. Thus, nonagricultural employment is actually a count of the number of jobs filled, rather than the number of persons employed.

Sources of data

S-1.) Prepared by the Montana Department of Labor and Industry's Research and Analysis Bureau in cooperation with the U.S. Department of Labor's Bureau of Labor Statistics (BLS). LAUS data (Local Area Unemployment Statistics program) is adjusted to the Current Population Survey benchmark and is the official BLS approved series that is used to allocate federal funds and determine eligibility for federal assistance programs. This series represents employment and unemployment by place of residence, and is not comparable to the place-of-work industry employment series (CES data). LAUS data is calculated for the week that includes the 12th of the month. Workers involved in labor disputes are counted as employed. Total employment in the labor force also includes agricultural workers, unpaid family workers, domestic workers and the self-employed.

S-2.) Prepared by the Montana Department of Labor and Industry's Research and Analysis Bureau. The unadjusted unemployment rate is prepared by the LAUS program in cooperation with the U.S. Department of Labor's Bureau of Labor Statistics. The seasonally adjusted rate is an unofficial series, and is provided only for use as a state economic indicator.

S-3.) Prepared by the Montana Department of Labor and Industry's Research and Analysis Bureau from LAUS data. Data for Service Delivery Areas and Labor Force Areas is calculated from the official data series by summing up employment and unemployment for the appropriate counties involved, and calculating an unemployment rate from the summed data for each area.

S-4.) Prepared by the Montana Department of Labor and Industry's Research and Analysis Bureau in cooperation with the U.S. Department of Labor's Bureau of Labor Statistics. Data from the CES (Current Employment Statistics) program represents nonagricultural wage and salary employment by place of work, and covers full-time and part-time employees who worked during, or received pay for, the payroll period that includes the 12th of the month. The data excludes the self-employed, volunteers, unpaid family workers and domestic workers. Persons on sick leave, vacations, or holidays (and being paid for that period by their employer) are considered employed. Payroll and worker hour data is collected for production and related workers in manufacturing industries, nonsupervisory workers in private service-producing industries, and construction workers in construction industries. The earnings figures are "gross" figures—that is, they reflect changes in wage rates, shift differentials and premium pay for overtime work. The hours figures relate to the hours for which pay was received, which is different from scheduled or standard work hours.

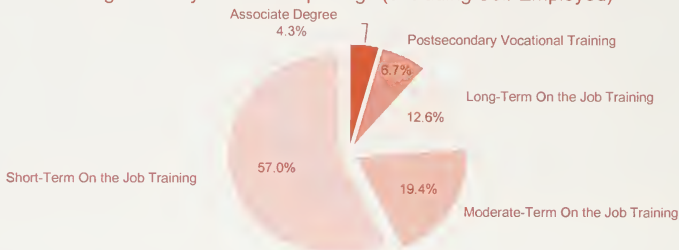
S-5.) Prepared by the Montana Department of Labor and Industry's Research and Analysis Bureau from a survey of Business Establishments as part of the BLS-790 Program. Information on female employment is computed as a ratio of all employees of the Current Employment Statistics, and is produced for informational purposes only.

S-6.) Tabulations produced by the U.S. Department of Labor's Bureau of Labor Statistics, and reprinted by the Montana Department of Labor and Industry's Research and Analysis Bureau for informational purposes only. This is a national data series because Montana data is not computed separately.

900 copies of this public document were published at an estimated cost of \$2.26 per copy, for a total cost of 2,034.00, which includes \$1,080.00 for printing and \$954.00 for distribution.

Training Needed for Next Year's Jobs Based on Short-term Job Projections for 2004

Percentage of Entry-level Job Openings (excluding Self-Employed)



Source: Research & Analysis Bureau, Montana Department of Labor & Industry

Approximate Training Time Required for These Educational Categories

- Associate Degree - two years
- Postsecondary Vocational Training - up to two years
- Long-term On the Job Training - over 12 months
- Moderate On the Job Training - between one and 12 months
- Short-term On the Job Training - less than one month

Find out more about Montana job projections on the Research and Analysis Bureau website at: www.ourfactsyourfuture.org.

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